

Supervision Guidelines Sample

Core capabilities Knowledge, experience, and skills that are fundamental to real estate practice, such as:	Emerging priorities and reforms Increases existing knowledge with more current information following changes or innovations in the industry, such as:	Business practices and processes Common business and administrative practices that are used in an agency to ensure it functions effectively, such as:	Professional capabilities A combination of knowledge, skills, behaviours, and specialist expertise that enhance an individual's career and management, such as:	Technical capabilities Specialised knowledge and expertise required to perform specific tasks and use specific tools and programs in real world situations, such as:
Communication and negotiation skills Marketing and advertising strategies Sales techniques Customer service and relationship management Time management and organisation Legal and regulatory compliance	Knowledge and application of current and upcoming changes in law Familiarity with emerging trends and innovations in industry Identifying and mitigating risks arising from these changes Staying informed and up to date with industry developments and emerging issues	Understanding of business operations and processes Accounting and financial practices Familiarity with business management software and tools Strategic business planning Evaluating and measuring business performance Making better data-driven business decisions	Networking and building professional relationships Business development and lead generation Financial management and budgeting Leadership and team management Ethics and professional conduct	Industry trends and market conditions Proficiency in property industry software and technology tools Knowledge of property listings and databases Ability to analyse property data and market research Familiarity with real estate finance and appraisal methods

Individual training goals, measuring performance and outcomes

Describe your agency's training goals, training to be completed, performance metrics, and outcomes as they relate to each licence holder. Goals may change from year to year, so your annual review process should include the opportunity to add, modify, or delete previous goals. However, to properly assess your progress, you must have some way of measuring success. Include information about mandatory continuing professional development as well as further training and professional development.

Example: Class 1 and Class 2 Licence Holders – Real Estate Sales

	Training/learning goals	Unit or training to be completed	Duration	Target completion date	Date completed	Follow-up required?
Compulsory CPD	Understand contracts for sale (to be completed at XYZ training event)	Training event XYZ - Contracts for Sale – Terms and Conditions	1 hour	25/04/2023		
	Better understand Supervision guidelines for possible LIC role in future	Training event XYZ – importance of supervision guidelines	2 hours	15/06/2023		
	Understand Privacy legislation	Training event XYZ – privacy requirements	1 hour	22/09/2023		
Further training	Working with ATSI communities	Online module delivered by ABC training	1 hour	01/06/2023		
	Improved conflict resolution skills	Online module delivered by ABC training	2 hours	13/09/2023		

Individual training goals, measuring performance and outcomes

Example: Class 1 and Class 2 Licence Holders – Property Management

	Training/learning goals	Unit or training to be completed	Duration	Target completion date	Date completed	Follow-up required?
Compulsory CPD	Understand difficult and non-common rental terminations	Online webinar – Managing unforeseen terminations	2 hours	25/04/2023		
	Better understand Supervision guidelines for possible LIC role in future	Training event XYZ – importance of supervision guidelines	2 hours	15/06/2023		
Further training	Working with ATSI communities	Online module delivered by ABC training	1 hour	01/06/2023		
	Improved conflict resolution skills	Online module delivered by ABC training	1 hour	27/08/2023		

Individual training goals, measuring performance and outcomes

Example: Assistant Agents

	Training/learning goals	Unit or training to be completed	Duration	Target completion date	Date completed	Follow-up required?
Compulsory CPD	Cert IV real estate	Unit – Establish and maintain property management portfolio		25/04/2023		
	Cert IV real estate	Unit – Establish and maintain vendor and lessor relationships and networks	2 hours	15/06/2023		
	Cert IV in real estate	Unit from Cert IV – Transact in trust accounts	1 hour	22/09/2023		
Further training	Conflict resolution skills	Online webinar with role play	1 hour	01/06/2023		
	Business accounting and finances	On-the-job experience with Admin manager	2 hours	13/09/2023		

ANNUAL TRAINING PLAN TEMPLATE

CPD year covered by plan (2023-2024)

Note: Training can include a combination of interactive training, online courses, workshops, mentoring, and job shadowing. Specific training will be aligned with the agency's performance goals for the year ahead and address an individual's learning, and development needs to help the agency meet those goals.

View topics on NSW Fair Trading's website: [Continuing Professional Development \(CPD\) requirements – Compulsory Topics](#)

Download the Word document format in the next book chapter